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Report and form control

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THE GEORGE WASHINGTON UNIVERSITY
School of Government

U. S. NAVY GRADUATE COMPTROLLERSHIP PROGRAM

REPORT AND
FORM CONTROL

For
SEMINAR IN COMPTROLLERSHIP
DR. A. REX JOHNSON

Prepared By
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January 1953

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I. INTRODUCTION

This term paper is a collection of information from many writers. I have attempted to take their ideas and combine them with many of my own. I do not feel that one can solve the problem of Report and Form Control through reading about it. However if I can bring out how important Report and Form Control is to the efficiency of an organization or even have the reader give thought to the subject, I feel that my mission has been accomplished.

I. INTRODUCTION

This paper is a collection of questions
from many writers. I have selected to read these letters
and possible cases also may be seen. I do not feel that
one can write the history of letters and form control
through reading about it. However it is the history of the
letters and form control is the history of
an organization or even have the reader like to
the subject. I feel that my letter has been answered.

II. TYPE OF REPORTS

Information Report

This is one of the simplest type of reports. It is prepared by a writer who is familiar with a group of facts unfamiliar to the reader. The object of the information report is to record in permanent form data which are constantly accumulating. The information report may take two forms, periodic and special. The periodic reports are written at regular intervals and are a matter of course rather than demand. They are generally used to tell what has occurred in an organization during a stated period, such as a day, a month, a quarter or more generally a year. Forms are generally used for this type report. The periodic report is generally administrative. The special report may be either administrative or professional.

The Examination Report

The examination report is one that the writer presents to an employer, data known to others but with which the writer and reader are unfamiliar. The purpose of this report is to obtain and to interpret the essential facts

Information Report

This is one of the simplest type of reports. It is prepared by a writer who is familiar with a group of facts and figures in the field. The object of the information report is to present in a concise and clear manner the facts and figures which are commonly known. The information report may have two forms, periodic and occasional. The periodic reports are written at regular intervals and are a matter of course. They are generally used to tell what has happened in an organization during a certain period, such as a day, a week, a month, or a year. The occasional reports are generally used for this type of report. The periodic report is generally administrative. The occasional report may be either administrative or statistical.

The Statistical Report

The statistical report is one kind of the writer's report. It is a report which contains facts and figures which are commonly known. The statistical report is generally used for this type of report. The statistical report may be either administrative or statistical.

regarding some particular materials, processes or persons. Many reports in the field of engineering, business and education fall into this group.

The Recommendation Report

Data from the information report and the examination report may lead to definite conclusions that may be submitted to an employer in the form of recommendations. Generally the recommendation report is prepared by an expert who is called for consultation and advice. The recommendation reports are generally subdivided into operation and design or construction reports.

The Research Report

The research report deals with the discovery of new organisms, the formulation of new theories, and the determination of new characteristics. The research report has three phases--descriptive, theoretical, and experimental. All three phases have highly specialized techniques. Generally the research report is not addressed to an individual.

regarding some important scientific progress or technical
new report in the field of engineering, business and
education will find this group.

The International Report

After the first international report and the results
the report will lead to definite conclusions that may be
submitted to the committee for the year of internationality.
Generally the international report is prepared by a
group and is called the international report. The
committee reports are usually submitted to the
and called the international report.

The International Report

The committee reports will be the discovery of
new principles, the formation of new theories, and the
formation of new principles. The committee reports
have been submitted to the committee, and the committee
will have the right to submit the committee reports.
All the committee reports are submitted to the committee.

III. REPORT CONTROL

One of the characteristics of business development has been the increased cost of office operations as compared to the functional operation of a business. The chief reason for such increase has been the steady accumulation of reports required of the office.

Reports are of great benefit to business. However care must be exercised to see that management gets the right type reports and only those reports that are required. Reports have a habit of perpetuating themselves unless properly controlled. As a result businesses find themselves weighted down with reports that do not justify the time, effort, or money.

The problem of reports is not a new one. The Duke of Wellington writing from Spain about 1810 to the British Secretary of War, Lord Bradford, wrote as follows:

"My Lord,

If I attempted to answer the mass of futile correspondence that surround me, I should be debarred from all serious business of campaigning.

I must remind Your Lordship--for the last time--that so long as I remain an independent position, I shall see that no officer under my command is

debarred by attending to the futile drivelling of mere quill driving in Your Lordship's Office-- from attending to his first duty--which is, and always has been, so to train the private men under his command that they may, without question, beat any force opposed to them in the field,

I am,
My Lord,
Your obedient Servant
(Wellington)"¹

The cost of reports is very large. Management should keep a very close check on the cost that is involved in each report required.

The United States Navy, through its report control program, has made extensive studies on the cost of reports. The following are some of the reported cost of preparing reports.

Mr. H. E. Marschald, Bureau of Ordnance, Navy Department--cost of preparing reports issued by the Bureau of Ordnance runs from \$20 per page to \$400 per page depending on the nature of the material involved in the report, the number of illustrations and the type of reproduction to be used. The mean average cost per page of writing and editing a report is probably about \$50 per page for a normal thirty to fifty page report.

¹O. L. Nelson, National Security and the General Staff. Infantry Journal Press, 1946, page 465.

Dr. O. W. Margrave, Training Publications, Bureau of Naval Personnel--The average cost of writing, editing and preparation for printing of a 350 to 450 page training manual is \$10,000. This averages out to a cost of about \$25.00 per page. The total \$10,000 cost can be broken down as follows: \$5800, salary for the writer. This represents one year's salary, which is an average for a writer, Grade GS-11, since it takes one writer a full year to write a report of this length and character; \$800.00 for the salary of an editor over a period of 2.64 months; \$500.00 for the cost of typing a report in preparation for publication; and \$1,750.00 for additional overhead and administrative cost.

Mr. R. C. Hayes, Technical Service Division, Naval Ordnance Laboratory--The cost of writing reports is calculated by allowing \$25.00 a day for the research scientist, \$5.00 - \$10.00 each for illustrations, \$4.00 a page for printing and \$50.00 a page for expediting and distributing.

From the Navy's study we can see that it is very expensive to prepare reports. However if a business needs a report the cost is a legitimate cost of doing business. The question is to determine if the reports are really necessary and if not, to eliminate them.

It would seem wise for every business to have some type of report control program. The purpose of the report control program would be to provide the necessary information to organizations at a minimum cost in money, effort and time.

It might seem that a report control program is a complicated matter. However it is not. All that it takes is for management to recognize the problem of report control and then assign the job to a qualified employee or staff. With cooperation and hard work the report control program can make the organization more efficient by the following actions:

1. Review all existing reports as to necessity, use, distribution, content, and frequency.
2. Eliminate, consolidate or otherwise restrict such reports as will lead to reductions.
3. Comply with standard form control practice.
4. Screen all new reports which may hereafter be desired to avoid duplication in part or in whole.
5. Collaborate with other offices to establish uniformity and nonduplication wherever possible.
6. Review periodically each report to determine that:
 - a. It is still required by each recipient
 - b. It contains no irrelevant information.

It would seem also for every occasion to have some form of direct control system. The subject of the report control program would be to provide the necessary information to organizations as a minimum cost in money, effort and time.

It would seem that a report control program is a complicated matter. However it is not, all that is needed is for management to recognize the problem of report control and then assign the job to a qualified person or people. This consideration and more will be discussed in detail.

Report control systems have been the subject of many articles in the following journals:

1. Review and analysis of report control systems, 1961, distributed, monthly, and bi-monthly.
2. Abstracts, compiled by various sources and reports as well as in the field.
3. Report and abstract from report control systems.
4. Survey of report control systems and methods of report control in various fields in the field.
5. Distribution of report control systems and methods of report control in various fields.
6. Report control systems and methods of report control in various fields.
7. Report control systems and methods of report control in various fields.
8. Report control systems and methods of report control in various fields.
9. Report control systems and methods of report control in various fields.

- c. The information reflects current requirements.
- 7. Maintain master file for ready reference.

of the information relative to the subject.

and

1. The information is for your reference.

IV. FORM CONTROL

Forms are playing a larger role in business each day. I think we would be safe in saying that business is more or less controlled by the means of forms.

A form is the easiest and most economical way to write a business report. If we did not have forms we would be overrun with paper work in conducting our business transactions.

Business forms serve many purposes. The main ones are as follows:

1. They provide management with information necessary in making decisions.
2. They serve as a form of communication between people, departments, and organizations.
3. They keep records of historical information.
4. They serve as references for comparison and control.
5. They are useful in the process of planning.

We might consider forms as business tools which are used in getting things done. When correctly designed and controlled forms are the main factors contributing to the success of all office methods, systems and procedures. Form control can mean the difference between a profitable business

IV. THE CONCEPT

There are many ways in which the concept of a business can be defined.

One way is to define it as a group of people who are engaged in a common enterprise.

Another way is to define it as a group of people who are engaged in a common enterprise.

A third way is to define it as a group of people who are engaged in a common enterprise.

A fourth way is to define it as a group of people who are engaged in a common enterprise.

A fifth way is to define it as a group of people who are engaged in a common enterprise.

business.

Business is a term which is used in many different ways.

It can be defined in many different ways.

1. It can be defined as a group of people who are engaged in a common enterprise.

2. It can be defined as a group of people who are engaged in a common enterprise.

3. It can be defined as a group of people who are engaged in a common enterprise.

4. It can be defined as a group of people who are engaged in a common enterprise.

5. It can be defined as a group of people who are engaged in a common enterprise.

6. It can be defined as a group of people who are engaged in a common enterprise.

7. It can be defined as a group of people who are engaged in a common enterprise.

8. It can be defined as a group of people who are engaged in a common enterprise.

9. It can be defined as a group of people who are engaged in a common enterprise.

10. It can be defined as a group of people who are engaged in a common enterprise.

and a nonprofitable one. Sometimes we are prone to overlook the cost involved in forms. For every dollar you pay the printer for a form, you generally have to spend about \$20 for filling in, interpreting, mailing, filing and storing. The total cost of a form from cradle to grave is thus \$21!²

The control of forms within an organization has become a new and important occupation. Many large organizations have proved the value of form control and form standardization programs. Many thousands of dollars have been saved through the program. Savings are available to any organization large or small that recognizes the importance of form control and establishes an effective program.

We might say that the prime objective of form control is to increase efficiency in office operating procedures. This efficiency is obtained through one or more of the following elements: quality, quantity, time, method or cost.

To achieve our objective I think it is essential to have centralized control. The logical place for it would be with the report control program. The employee selected to head the form control program should be a person that has the experience, ability and initiative to solve the form control problems of the organization. He should have the authority to decide the type of forms and the system to be used.

²N. O. Couvillon, "Form Control Means Cost Control," The Management Review, (February, 1952) page 94

and a new and improved constitution. Many large organizations have passed the value of their control and have demonstrated the wisdom of their action. Many thousands of dollars have been saved through the program. Savings are available in all organizations large and small that recognize the importance of their control and

The form control supervisor must have a good understanding of all clerical operations. He should be open to suggestions. He should have a good understanding of printing processes. He should be an expert in form design. He should have a good knowledge in the cost of printing and the use of the finished form.

The form control supervisor should be furnished sufficient personnel to carry out his program. Qualified form draftsmen are necessary for drawing forms. Sufficient office workers are necessary for keeping files on all existing forms and to handle other routine office work such as the numerical register, filing and correspondence.

Every form in an organization should be controlled at all times. The unnumbered, or temporary, form should be scrutinized and, if found to be a worthwhile form, given a control number; otherwise it should be discarded at once. We should keep a very close watch on the forms that are printed on the office duplicator. These forms often turn out to be the most expensive. Often the using unit will argue it is not a form. However, if it has spaces to be filled in we must consider it as a form. This is necessary if we are to be efficient in our form control program.

Should a new form be needed by a department, the department head should submit his request, including a rough sketch of the proposed form, to the form control supervisor.

The first subject mentioned was that of a good number

standing of the financial position. He should be given a
statement. He should have a good understanding of the
position. He should be in a position to know the
state of the country in the past of the country and the state of
the financial position.

The first subject mentioned should be the first

subject mentioned. He should be given a statement. He should
have a good understanding of the position. He should be in a
position to know the state of the country in the past of the
country and the state of the financial position. He should be
in a position to know the state of the country in the past of
the country and the state of the financial position.

Every time in the organization should be considered

at all times. The organization, on the other hand, should be
considered as a whole. It should be in a position to know
the state of the country in the past of the country and the
state of the financial position. It should be in a position to
know the state of the country in the past of the country and
the state of the financial position. It should be in a position
to know the state of the country in the past of the country and
the state of the financial position. It should be in a position
to know the state of the country in the past of the country and
the state of the financial position.

Should a new law be needed by a government, the

government should make a request, including a copy
of the proposed law, to the first subject mentioned.

The form control supervisor is then charged with the responsibility of discussing its application and developing its procedural routine with the requesting department head. Only when final design and method of use is approved by all concerned is the form control unit ready to make the layout and write up the specifications.

The form control unit assigns each new form a control number. The purpose of this number is to identify the form in ordering and in stock control. It can be used to denote other things, if desired, such as originating department, date purchased, etc.

In ordering forms consideration should be given to the type paper. The use of expensive colored paper is used too often. White paper will generally do the job just as well and is much cheaper. The kind of paper should also be taken into consideration. Often a cheaper grade of paper will serve our purpose as well as the more expensive paper.

The form control program should be charged with such other duties as eliminating all unnecessary forms, to revise required forms so that they will facilitate the logical flow of work and mechanics of procedures, to reduce paper work, eliminate nonessential or obsolete data, combine forms serving the same purpose, reduce duplication of effort and to simplify the forms to be continued. In order to carry out such duties the form control supervisor must set up a definite program to

The first section, however, is more complex when the composition
of the committee is considered. The committee was formed in the
early part of the year, and its members were chosen by the
board. The first meeting was held in the early part of the
year, and the committee was organized. The first meeting was
held in the early part of the year, and the committee was
organized.

The first meeting was held in the early part of the year, and
the committee was organized. The first meeting was held in the
early part of the year, and the committee was organized. The
first meeting was held in the early part of the year, and the
committee was organized. The first meeting was held in the
early part of the year, and the committee was organized.

In order to be successful, the committee must be given the
right kind of support. The use of the committee must be given
the right kind of support. The use of the committee must be given
the right kind of support. The use of the committee must be given
the right kind of support. The use of the committee must be given
the right kind of support.

The first meeting was held in the early part of the year, and
the committee was organized. The first meeting was held in the
early part of the year, and the committee was organized. The
first meeting was held in the early part of the year, and the
committee was organized. The first meeting was held in the
early part of the year, and the committee was organized.

meet the requirements. A review of each form in the organization, at least once a year, is of prime importance. There have been many cases where forms were being used for an extended period of time after they had served their purpose.

The duties of an effective report control program are so voluminous that I could not expect to go into detail on all of them in this report. However, I have prepared a check off list which might be used in carrying out the duties of a form control program.

I General USE

1. What are the purposes of the form and how is the form used?
2. Does the form accomplish the purpose or can some other form accomplish it better?
3. Can this form be combined with some other form?
4. Are the correct number of copies being used?
5. Does the title indicate the use for which the form is intended?
6. Has the form been approved by proper authority?

II Contents

7. Are the data necessary for present operation?
8. Are similar reports made elsewhere?
9. Can any items be discontinued?
10. Are all recurring data printed?
11. Has the form control number been included?

near the capital. A review of the town in the morning
 of the 1st of June, is of great interest. There have
 been some cases of cholera and some deaths.
 It is also noted that the cholera is spreading.

The matter of an effective control program
 is being considered. It would not be an easy matter to
 carry out in this country. However, I have prepared a report
 on the subject which is being sent to the State and
 the Federal Government.

I remain, Sir,

1. List of the names of the town and how it is
 used.
2. List of the names of the persons on the same
 town as the town is used.
3. Can this town be considered a town of the
 town?
4. Are the names of the persons on the town
 the same as the names of the persons on the town?
5. How is the town used?
 Information.
6. How is the town used?
 Information.

Yours faithfully,

7. How is the town used?
 Information.
8. How is the town used?
 Information.
9. How is the town used?
 Information.
10. How is the town used?
 Information.
11. How is the town used?
 Information.

III Arrangement

12. Has it been tested for proper spacing?
13. Are the most important data in the most prominent location?
14. Is sequence of items same as on forms from which and to which information is transcribed?
15. Can both sides of the paper be used?

IV Sources of Information

16. Have the people who are going to use the form been consulted for suggestions?
17. Have potential users been consulted for suggestions?

V Paper and Printing

18. Is the size standard?
19. Are the grade and weight standard for the desired purpose?
20. Is white paper used in lieu of colored where feasible?
21. Have all specifications been included on the printing request?

It has not been my intention to include everything in the above check off list. however, it is hoped that it will serve the purpose as a guide. Each organization will have different demands and will have to make their own list to coincide with their needs.

To show that an energetic control program will make an organization more efficient the following cases from the Marine Corps Depot of Supplies, Philadelphia, are cited:

- Case I Frequency of Feeder Reports Reduced:
The amount of expendable supplies used daily for each of the six power plants had been totaled and furnished daily as a feeder report to the Depot's "Monthly Consolidated Utilities Report." One-hundred (100) man hours were saved by eliminating the daily computations and requiring instead only a monthly feeder report.
- Case II Overlapping Reports Consolidated:
An analysis of three material reports required by the Depot showed considerable duplication in the items reported. These reports were (1) Report of Material Due In (2) Report of Materials Received (3) Report of Delinquent Material. The three were consolidated into one report with resultant 150 man hours benefits.
- Case III Basic Time Record used in lieu of Separate Report:
The Depot eliminated a Monthly Man-hour distribution of Marine Corps - Navy Publicity Bureau Report. Investigation revealed that the information was available from the "Job Time Distribution Cards" maintained on the employees. The administrative clerk in the Marine Corps - Navy Publicity Bureau will be able to secure the data from these records, therefore the separate report was cancelled.

The above-cited cases are but a few of the examples of savings effected through form control. The organization that fails to exploit the benefits of a good control program will soon find that they are falling behind their competitors.

³ Quartermaster General of the Marine Corps, "Feasibility of Establishing Reports and Forms Control Programs" (Washington, D. C.: December 17, 1952), page 2.

V. CONCLUSION

The subject of report and form control is one of growing importance. A great deal of attention must be devoted to the problem if we are to operate efficiently. Management can overcome the problem of excessive reporting if they recognize the need and combat it with an effective program.

7. CONCLUSION

The analysis of reports and field comments is one

of several methods. A great deal of attention must

be devoted to the problem of how to secure satisfactory
management and personnel the problem of excessive personnel
if that condition is not met it will be effective

program.

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